

# THE 5-STEP GUIDE TO BUILDING AN **IT SELF-SERVICE PORTAL** THAT WORKS FOR YOUR UNIVERSITY

With processes, workflows, and best practices  
from leading universities



ManageEngine  
**ServiceDesk Plus**

# TABLE OF CONTENTS

## CHAPTER 1

Introduction 01

## CHAPTER 2

Defining your clientele 03

## CHAPTER 3

Building an IT self-service portal 05

2.1 The various approaches

a) Focused approach

b) Unified approach

c) Hybrid approach

2.2 The critical components

Designing the service catalog 11

3.1 Service category

3.2 Service

3.3 Service offering

3.4 Service attributes

## CHAPTER 4

Building a knowledge base 15

## CHAPTER 5

Onboarding end users 17

Conclusion 20

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We need technology in every classroom and in every student and teacher's hand, because it is the pen and paper of our time, and it is the lens through which we experience much of our world.

**- David Warlick, educator -**

Such is the role of technology in education today. Gen Z students who are accustomed to the use of technologies shouldn't be limited by an unavailability of technology in their study environment, especially in college. Fortunately, technologies like mobile devices and cloud computing have already become an integral part of our education ecosystem.

These developments, coupled with the efforts of instructional technology experts, will lead to newer technologies like augmented reality being used to create an effective learning environment in the classroom. But for all of these initiatives to succeed, the school's IT service desk team has to be on board.

Similar to businesses, digital transformation (DX) in educational institutions relies heavily on internal IT teams. In an educational institution, one key area that acts as the gateway between the IT service desk team and its audience is the IT self-service portal.

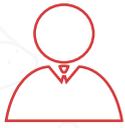
With thousands of students enrolling and graduating from large institutions every year, things can quickly get complicated for the IT department. As important as it is to have a well-designed process to manage IT services within an educational system, it's also vital that you build an IT service desk portal that promotes a culture of self-service by providing quick and easy access to necessary IT services.

In this white paper, we discuss various steps to build an effective IT self-service portal with a service catalog specific to the education industry. Throughout the white paper, we analyze various self-service portals and assess what they do best.

The key steps to building an effective IT self-service portal in an educational institution include:





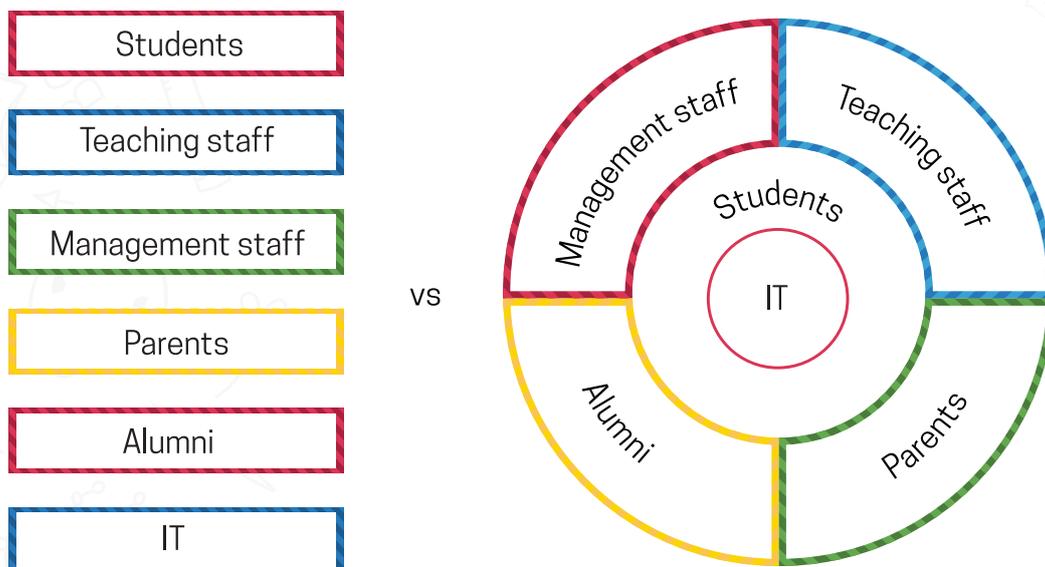


## Defining your clientele

*The service desk's end users*

Since the introduction of computing technology in the classroom a few decades ago, the various ways people use it has evolved. From the use of bulky desktops in computer labs to compact, smart devices with each student, computing technology has come a long way.

Today, IT service desk teams face a host of additional challenges, as their clientele ranges from visitors who only need access to Wi-Fi, to faculty and students who need long-term access to a variety of tools and apps. So, before designing an IT self-service portal, it is vital that IT service desk teams determine who they need to serve.

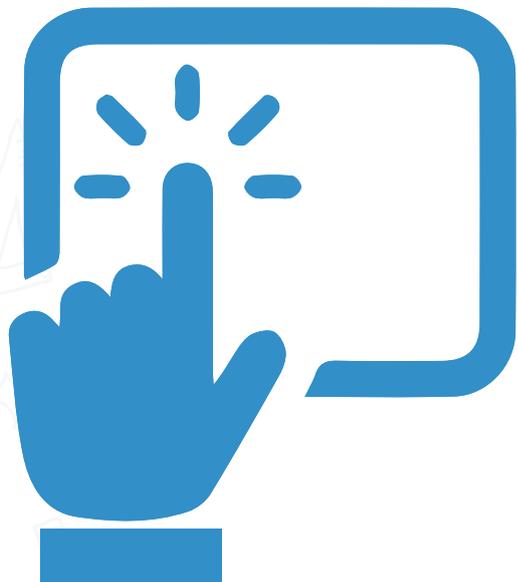


Typically, IT clients in educational institutions include students, faculty, staff, parents, alumni, and visitors. As technology usage in the educational space has increased, IT is no longer solely a parallel function to teaching or management. In fact, IT has become the integral technology enabler around which students and other stakeholders function, as they rely heavily on its services for everyday functions.

Let's take a quick look at the IT self-service portals of three top universities in the US along with their respective audiences:

- The University of Chicago services students, staff, faculty, and visitors.
- The University of California, Davis services the IT provider, staff, faculty, and students.
- Stanford University services former employees, hospital employees, parents of students, prospective postdoctoral researchers, prospective students, alums, suppliers, payees, and retirees.

Audience segmentation is based on the structure of the educational institution as well as the processes of the IT service desk team. Once the audience segmentation is complete, the next step is to design an IT or enterprise service management portal that addresses the requirements of each of these segments.



## Chapter 2

### Building a self-service portal



## Building a self-service portal

*The various approaches and the critical components*

The online self-service portal acts as a gateway for end users, providing access to various services. These portals should typically do more than host the service catalog. They need to establish the role of IT in the educational institution while offering a summary of the services they provide as well as any prerequisites needed for end users to access these services.

### 2.1 The conventional approach vs. an enterprise service management (ESM) approach

Based on the environment and the process requirements, IT service teams can build three types of portals. The first approach, the focused approach, is the conventional one—hosting multiple unique self-service portals; for example, a separate portal for IT, academics, HR, facilities, etc.

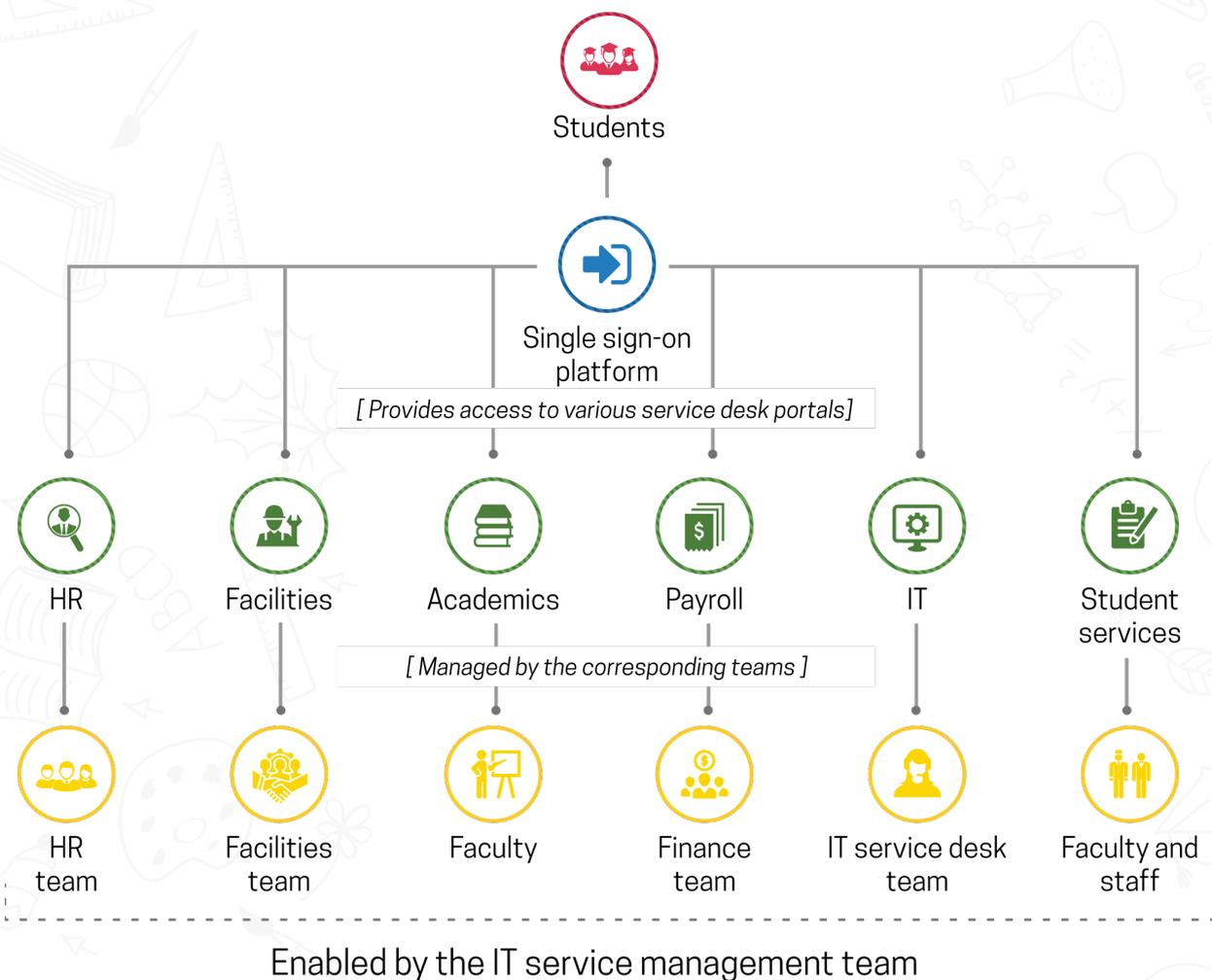
The second approach, the unified approach, is an enterprise service management approach that extends proven IT service management practices, including service request management and incident management, to the other departments and ancillaries in the institution.

The third and final approach is the hybrid approach that, as its name implies, uses a combination of the focused and unified approaches.



### a. Focused approach

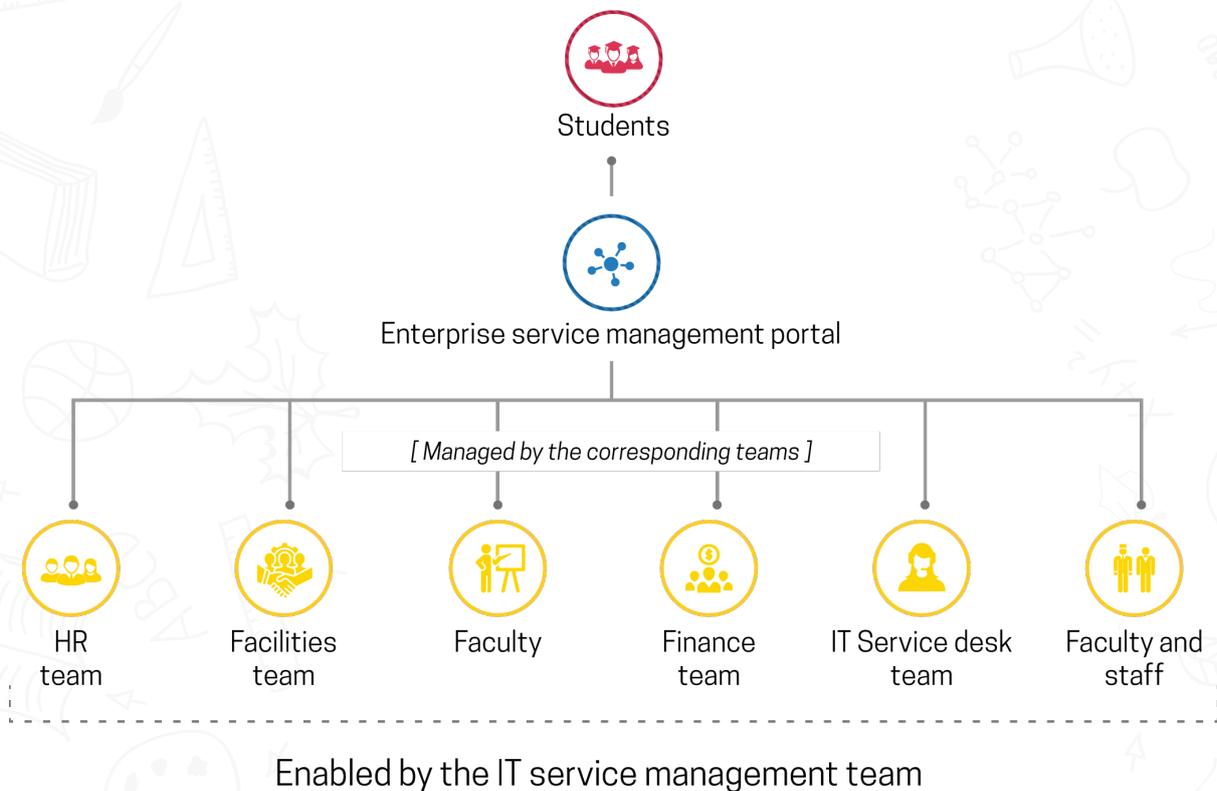
Multiple portals, each facilitating request management in specific departments (an IT portal, educational portal, facilities portal, etc.)



## b. Unified approach

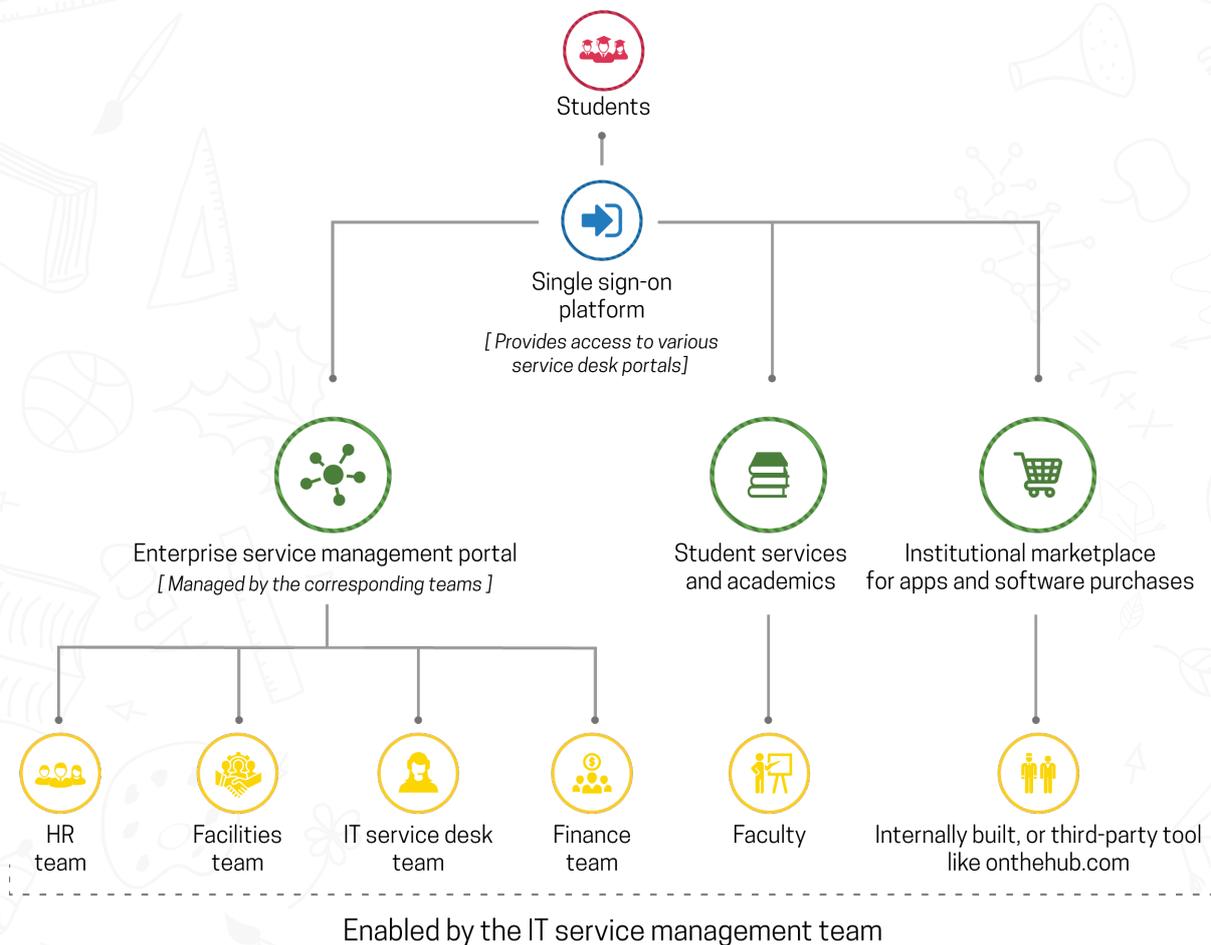
A single enterprise portal that gives access to various departments, including IT, academic and student services, facilities, etc.

Stanford University's self-service portal takes a unified approach.



### c. Hybrid approach

A few widely accessed departments are grouped into a single portal, and other departments are hosted individually.



## **2.2 The critical components**

Regardless of the approach, every self-service portal must contain a few critical components, including:

### **Appropriate audience-specific subportals**

There are separate portals for students, staff, faculty, and visitors, which makes it easier for users to understand what the portal has to offer them.

### **Introduction to the service desk**

This can include a brief intro about your IT team — names, what they do, working hours, contact details, etc.

### **Summary of services offered**

- Services before they arrive: these can include setting up university IDs and email accounts.
- Services when they're at the university: these include all the services that the end users are entitled to.

### **Service catalog**

A list of all the services that each end user is entitled to. The service catalog is a key component of any self-service portal, and we'll discuss it at length in the next section.

### **Service status**

A brief list of all your services and their availability. This list can also include any planned maintenance activities that could hinder service availability. For example, Ohio State University lists all its service statuses with information on their historic availability, current statuses, service degradation, outages, and planned maintenance.

## **Knowledge base**

It's important to invest the time to build your service team's knowledge base. The Wharton School of Business at UPenn has one of the best knowledge base repositories; its IT team is able to handle all student on boarding through its knowledge base, which we'll talk more about in the upcoming sections.

## **New and emerging services**

It's best to keep end users informed of the services that are in the pipeline. UC Davis has a section of its portal dedicated to this.

## **Executive dashboard**

In every service desk, it's vital to keep the stakeholders informed of key performance indicators in order to establish the value delivered by the service desk team.

The above list is fairly comprehensive; however, more components can be added or removed based on your specific requirements.

If you're looking for a real-life example of a self-service portal that performs well across all the above points, take a look at the University of Chicago. UChicago's central IT self-service portal explains everything about the service desk team, including all their featured services. It also includes a dashboard and audience-specific portals, offering quick and easy access to their top services.



# Chapter 3

## Designing the service catalog



## Designing the service catalog

*The four essential building blocks*

Now with the portal's approach decided and its components finalized, it's time to build the service catalog. While working on your service catalog, there are a few important components. As suggested by Educause's report "The Higher Education IT Service Catalog," the four major service catalog components include:

**3.1. The service category**, which is a division of closely associated services.

Typically, a service catalog has anywhere from six to ten service categories, and this categorization makes it easier for end users to find the service they're looking for. There's no exact rule on how these services have to be categorized, so we've provided you with a glimpse of how various universities have categorized their services below.

### University

**BYU** | OFFICE OF  
INFORMATION  
TECHNOLOGY

### Service categories

- Accounts, access, and security
- Application development and developer resources
- Classroom, events, and multimedia
- Communications
- Computing equipment and software
- Help and training
- Information reporting services
- Labs, kiosks, and printing
- Network and connectivity
- Servers, storage, backup, and databases

## University



## Stanford University

### Service categories

- Academic and research services
  - Accessible technology
  - Accounts and passwords
  - Administrative systems
  - Classrooms, labs, and course management
  - Data center services
  - Desktop and mobile devices
  - Email, calendar, and Google
  - Library IT services
  - Media and events
  - Network, wireless, and telephone
  - Physical security
  - Residential IT services
  - Security and policy
  - Software and web services
- Academic technology
  - Administrative support
  - Business systems and applications
  - Computers and mobile devices
  - Email, calendar, and file storage
  - IDs and accounts
  - Network
  - Office phones, pagers, and TV
  - Security and compliance
  - Servers, storage, and backup
  - Technical support and consulting
  - Technology training
  - Video conferencing and chat
  - Websites and web tools

**3.2.** As defined by ITIL®, a **service** is a means of delivering value to the end user. Examples of services include setting up a new email account, requesting a software license, and so on.

**3.3. The service offering** is the means or technology options available for the end user during the time of availing a service. For example, Wharton lists the following service offerings for each of its services:

Service	Service offering		
Productivity software	 		
Email clients	  		
Cloud storage options	  		

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**3.4. The service attributes** include all key information about the service. Some key attributes listed by portals across universities like UC Davis and Ohio State University include the following:

- A brief introduction of the service along with its description
- The advantages the service delivers to the intended user
- The availability of the service
- The intended audience of the service
- Any pricing associated with the service, if applicable
- The SLAs associated with the service
- Means to request the service, such as a link to the web form, the contact details, or access to platforms and marketplaces like Onthehub.com
- List of related services and knowledge articles

So, now that you've learned about the four critical components your service catalog must have and have seen examples from some existing university service desks, you can kick-start your journey toward an effective service catalog.



# Chapter 4

Building a knowledge base



## Building a knowledge base

*The structure and categorization of your self-help articles*

The presence of a well-equipped knowledge base is critical to the success of any self-service portal. A comprehensive knowledge base can help keep ticket volumes under control by providing the information end users need to resolve certain issues on their own and promoting a culture of self-resolution. The articles and solutions in a knowledge base are typically categorized by service category for easy end-user access.

Wharton's knowledge base is so sturdy that the school deals with its student onboarding and offboarding primarily through its knowledge base. Wharton lists the following categories as a part of its knowledge base:

- Connections, Wired and Wi-Fi
- Accounts, access, and email
- Printing and public technology
- Canvas and learning tools
- Security
- Apps and collaboration
- Research
- Setup and get help
- My Wharton

These knowledge base categories are closely aligned with their service categories.

Every knowledge base section in the self-service portal should include the following:

- List of knowledge categories
- List of available articles
- The most viewed articles
- The top rated articles

Also, every knowledge article should allow users to rate articles in order to record the relevancy of the solution to the category or purpose. These data inputs can provide valuable insights for the service desk teams, including:

- Which articles aren't performing well and need to be removed or updated
- Articles that are performing well, which can be moved to a more prominent section
- Articles that have average ratings which need to be revised or improved.



# Chapter 5

## Onboarding end users



## Onboarding end users

*The shifting left model to handling user entry and exit*

Now that we've defined our audience, identified the key elements of our IT self-service portal and the service catalog, and populated the knowledge base, the next critical step is to onboard end users into the IT ecosystem. With thousands of students enrolling every semester, onboarding all of them manually can be a challenge for any IT service desk team.

In the context of ITSM, the shifting left model involves moving the resolution process as close to the end user as possible, preferably through a self-service portal. When done correctly, this approach quickens the resolution process, reduces costs, and improves end-user satisfaction. Given how tech-savvy today's students are, you should consider shifting the entire onboarding process left with thorough, relevant knowledge base articles and guides.

### Students onboarding themselves (Self-service)

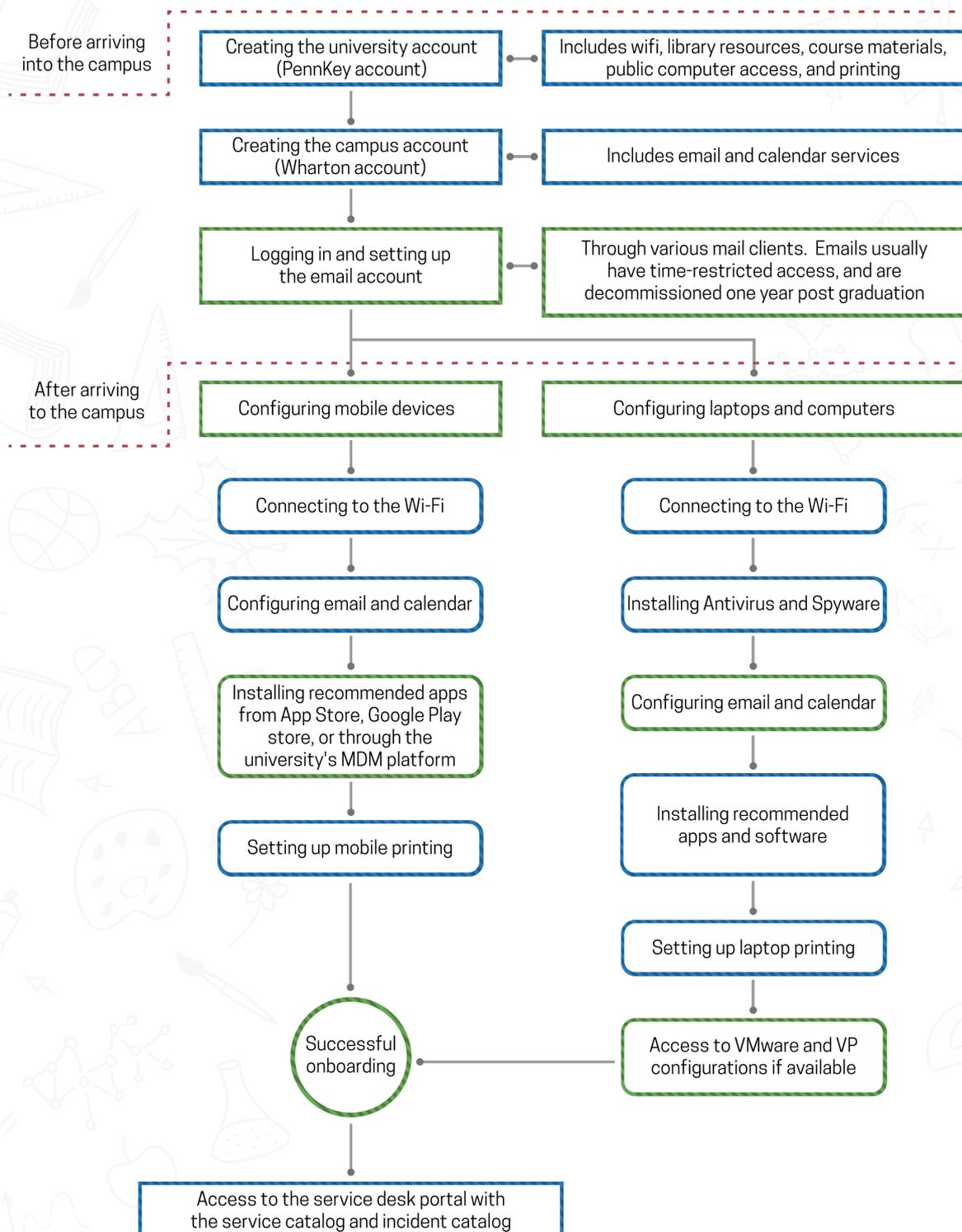
Quicker  
Inexpensive  
One-time effort for IT

Shift-left

### IT techs onboarding students (L1 and L2)

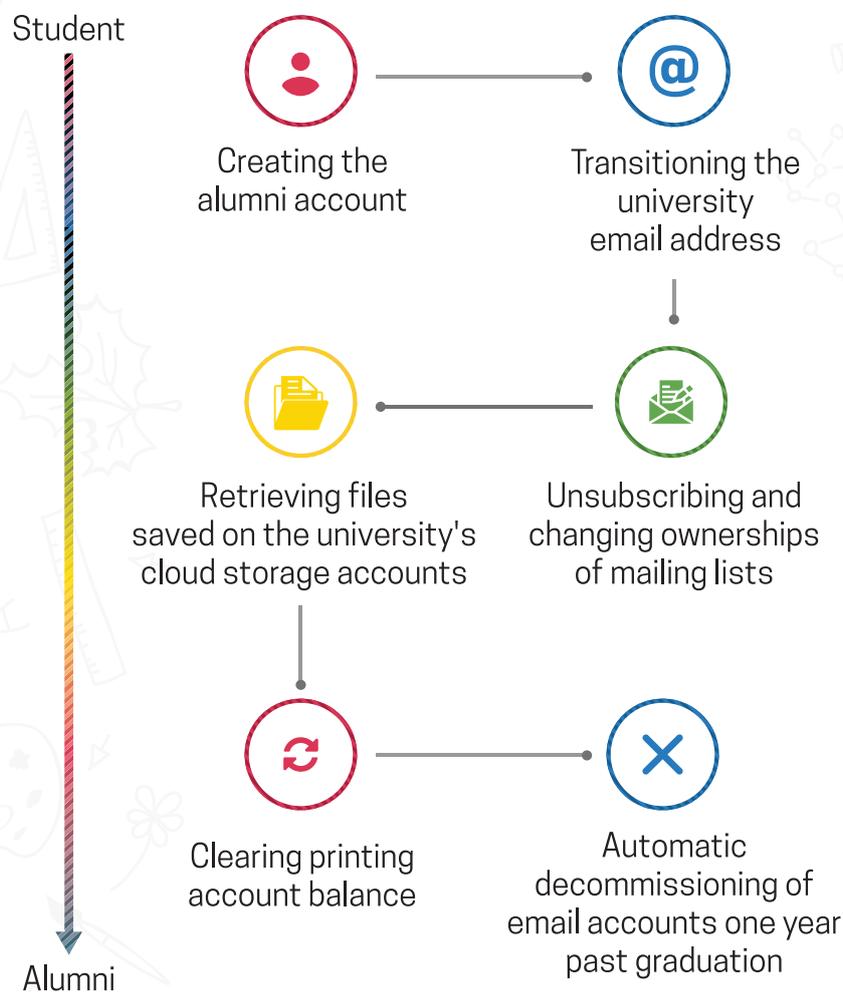
Time-consuming  
Expensive  
Less efficient

Wharton follows the above principle and handles all its onboarding through a series of articles and step-by-step instructions. According to their Whartonization Guide, the workflow includes the following steps:



With detailed instructions at every step of the way, onboarding into the university's IT ecosystem and, subsequently, the self-service portal to get access to service offerings, is hassle-free for the students and frees up the IT service desk team to work on other, more pressing matters.

Wharton has gone a step further to shift student offboarding to the left. This procedure involves the following:



These processes and workflows can serve as a helpful guideline for IT service desk teams looking to automate or left-shift the onboarding and offboarding processes.

## Conclusion

These are the five steps required to deploy a self-service portal that will become the gateway for technology in educational institutions. The mention of various university service desks and their portals are highlighted only to provide a look at real-life scenarios.

IT service desk teams don't necessarily have to stick to the exact parameters, configurations, and setups illustrated here; however, these examples should provide a solid base to build upon. Here's wishing you all the best of luck as you build self-service portals for your educational institution.

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**Disclaimer:** All the information regarding any university portal across this white paper has been made available here from publicly available resources, links, and articles; in some cases, we've included the public-access sections of the portals as well.

## About ServiceDesk Plus

ServiceDesk Plus is a full-stack ITSM suite with integrated asset and project management capabilities. With advanced ITSM functionality and easy-to-use capability, ServiceDesk Plus helps IT support teams deliver world-class service to end users with reduced costs and complexity. It comes in three editions and is available in 29 different languages. Over 100,000 organizations across 185 countries trust ServiceDesk Plus to optimize IT service desk performance and achieve high end-user satisfaction.

To learn more about ServiceDesk Plus please visit [www.manageengine.com/service-desk](http://www.manageengine.com/service-desk).

## About ManageEngine

ManageEngine is bringing IT together for IT teams that need to deliver real-time services and support. Worldwide, established and emerging enterprises - including more than 60 percent of the Fortune 500 - rely on our real-time IT management tools to ensure tight business-IT alignment and optimal performance of their IT infrastructure, including networks, servers, applications, desktops and more. ManageEngine is a division of Zoho Corporation with offices worldwide, including the Netherlands, United States, India, Singapore, Japan and China.

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